Spring Cleaning

DISCOVERY DOCUMENTATION REFRESHER

Agenda

Welcome and Introductions

Objectives

Overview of Recent Changes

Best Practices

Guided Activity

Wrap up

Objectives

After completing this training, learners will:

- Identify updated documentation requirements

- Learn about successful practices in documentation completion

- Apply practices through guided activities

Overview of Recent Changes

Incorporate information from the MPS into the Discovery Profile

Require monthly submissions to VR

MPS will no longer need to be submitted to VR during the provision of Discovery Services

From the Beginning

See Sample referral PDF

Employment Service Referral Form

IMPORTANT: Include collateral information such as intake case notes, application information, information learned so far (including, if applicable, the Discovery Profile), evaluations, guardian information, or other information as applicable.

Participant Information

Name:	Jodi James	VR Identification Number:	340012	Date of Birth: *(month, day, year)*:	05/22/1977	Gender:	Female
Preferred Name:	Jodi	Preferred Pronouns:	she/her	Telephone:	(860) 125-4555		
Address:	36 Test Ct Greenwood, IN 46142	Living Arrangement:	Private residence	Alternate Contact:			
Legal Guardian:	[] Yes [x] No	Legal Guardian Name:	n/a	Legal Guardian Contact:	n/a		
E-Mail:	smileyday@gmail.com	Primary Disability:	Psychosocial Impairments, Anxiety Disorders	Secondary Disability:	Other Mental Impairments, Mental Illness Not Listed Elsewhere	Severity Level:	Most Significantly Disabled

Referral Date *(month, day, year)*:	March 13, 2024	Provider:	
VR Counselor:	Betsy Williams	VR Counselor Contact:	betsy.williams@fssa.in.gov,
VR Case Coordinator:		VR Case Coordinator Contact:	

Anticipated Services Needed:

[x] Discovery
[] Job Readiness Training
[] Employment Service Milestones
[] Job Search / Placement Assistance
[] On the Job Supports Short Term
[] Supported Employment Services

Anticipated Services Needed:

[x] Discovery
[] Job Readiness Training
[] Employment Service Milestones
[] Job Search / Placement Assistance
[] On the Job Supports Short Term
[] Supported Employment Services

Please describe specific needs, additional comments, special considerations, expectations, etc.:

Jodi has previously worked in retail, but during the holiday season she was let go as the hours were too long for her and she reported feeling very overwhelmed with the amount of people in the store. Due to these feelings, she took longer breaks than she was supposed to and she said she called out once a week.

What length of time is most appropriate for Jodi physically? Does she feel like she has more energy in the morning or afternoons? What kind of enviroment does she feel most comfortable in and why? Is there a theme or what makes a place comfortable to her?

From the Beginning

See Sample referral PDF

Introduction

The Discovery Profile records what has been learned during the Discovery process. Just like the Discovery process, this profile belongs to the participant. The Discovery Profile is designed to help the participant determine a vocational goal that matches their strengths and interests. Each time an activity is completed, record the participant's strengths and key factors for successful employment in section 1.1 with the participant (use the Addendum if needed). Section 1.2 is required to be completed monthly. Themes specific to the participant should be captured in section 2.1 as they emerge.

The Discovery Profile should be updated each month until the completion of Discovery and sent to the VR area office by the 10th day of the following month. (Please do not send the profile directly to the VRC.) Fill in the additional comments and number of times met with the participant under each Month Review for section 1.2.

Date Discovery Started *(month, day, year)*: Click or tap to enter a date.

Date Submitted to VR *(month, day, year)*: Click or tap to enter a date.

Participant Information		Name:	Participant name.
Contact (Telephone, E-mail, Address):	Contact	Alternate Contact:	Alternate contact.
Employment Consultant (EC):	Employment Consultant.	EC Contact Information:	EC Contact Info.
Support Team (e.g. family, case manager, residential, behavioral specialist, teacher, etc.)	Support team.		

Section 1.1

Discovery Activities

1.1 Discovery Activities: *List Discovery activities. Select the type of activity and date through the drop-down box. Describe what was learned by the participant and Employment Consultant in each category. If a section is not relevant, write 'not applicable' or 'NA'.*

Activity #1 Choose an item.	Date (month, day, year): 00/00/0000	Location: Location.
	What did the participant do? What was the purpose?	
Tasks	List tasks that were demonstrated. A task is a part of a job or process. A task is a piece of work to be done.	
Skills	List skills that were demonstrated. A skill is a learned ability to do something, with or without support. Skills are needed to complete tasks. (Example: Basic	

	computer skills, use of multi-line phone, customer service skills, light cleaning, troubleshooting, decision-making)	
What was learned by the participant and Employment Consultant based off this activity?	Include observations of strengths, conditions of employment, interests, and personality traits. Did the participant need support to complete a task or skill? What worked well?	
Next Steps	How will the participant and the EC use what was learned during this activity? What would the participant like to learn more about? Is a vocational theme emerging?	

Tasks vs. Skills

TASKS

A task is a unit of work activity that produces output.

- Examples:
  - Stocking shelves
  - Operating a cash register
  - Composing and responding to emails

SKILLS

A skill is the ability to perform a particular type of task.

- Examples:
  - Following a stock list and pulling correct items
  - Making change
  - Providing good customer service
  - Operating a time clock
  - Appropriate and professional written communication

Lessons Learned During Discovery

What information was learned that would help the team determine vocational themes, appropriate supports, and identify next steps?

- **Examples:**

  - Navigated the cart to the appropriate aisle and find the items required to stock.

  - Struggled to locate items that were not in the aisle if asked by a customer.

  - Engaged appropriately in conversation with other employees and customers.

  - Stated she did not like stocking in the refrigerators and freezers; prefers room-temperature environments.

  - Transportation was a difficulty for the family to make work due to distance from home.

Next Steps

◦ **Using what has been learned so far, identify what additional steps will be taken to resolve remaining questions.**

◦ **Examples:**

  ◦ Test stamina by changing the number of hours in a shift and obtain participant feedback to determine an ideal length of shift.

  ◦ Visit other types of stores (avoiding cold environments) where the participant has reported interest in stocking.

Section 1.2

1.2 Monthly Review: *This section provides a monthly summary of progress, including the number of in-person meetings, number of remote contacts and additional comments.*

	Number of in-person contacts: Choose an item.	Number of remote contacts: Choose an item.
Month 1 Month/Year 00/0000	Are there sufficient hours left to move forward with Discovery for next month? Choose an item.	Is Discovery completed? Choose an item.
	Monthly Comments: *What other contacts has the EC made and with whom (participant/guardian/VRC)? What are the next planned activities? Does a team meeting need to take place with the VRC to develop a job goal or discuss case progress? Are there issues that need to be communicated?*	

Section 2

2.1 Vocational Themes and Aligned Businesses: *Use this section to **brainstorm** with the participant and list at least three themes that the participant would like to discover or add when an emerging theme is known. List themes that meld tasks, interests, talents, and skills that are being observed through Discovery. Learn more about careers related to the themes identified to help confirm if each theme is a good fit for the participant:* https://www.onetonline.org/find/ . *Examples of broad themes might include agriculture, fashion, or building. Under each theme, list businesses and tasks to try that fall under the respective theme.*

Theme 1: Fashion	Theme 2: Theme 2.	Theme 3: Theme 3.
• Marshall's / folding clothing	Business 1.	Business 1.
• Business 2.	Business 2.	Business 2.

Sections 2.2 and 2.3

2.2 Interests: *Summarize interests that were observed through Discovery activities. Provide evidence for these interests. If the participant (or another person) does not identify interests, use the Discovery process to find possible interests.*

Summarize interests here.

2.3 Personality Traits: *Identify personality traits that the participant demonstrated. Provide evidence for these personality traits.*

Frame traits as strengths. All personality traits are strengths in some situations and challenges in others. Examples include persistent, realistic, or charming.

Section 2.4

Summary

Topic	Summarize what has been learned
Best Learning Method	
Places/Situations to Avoid	Places/situations to avoid (aspects of a workplace like lighting or noise level)
Personal Resources	Examples include benefits (SSI, SSDI, TANF, SNAP, waiver services) family support, job connections, or childcare support
Preferred Work Location	Counties or cities where participant can work
Transportation to and from Work	Who and how?
Preferred work schedule, benefits, wages and why	Days and hours, part-time or full-time, PTO, health insurance, 401k, etc.
Support/Accommodations to Address Identified Barriers	Need for routine and use of natural supports, accommodations, and assistive technology to address identified barriers.
Disability or Barrier Disclosure	Describe results of disclosure counseling. For example, the participant may wish to disclose their disability to a supervisor, but not coworkers. A participant may wish to disclose their needs, but no their diagnosis

Learning Styles

	Training Techniques	Environment	Meeting Structure	Memory Retention
Visual Learners	Diagrams Charts Mind maps Videos Animations Color coding Match to sample	Well-lit space Visually appealing Visually stimulating Spatially organized	Visual aids Breaks Timelines Flow charts Diagrams to visualize your plan	Use visualization techniques and draw connections between concepts. Flashcards with images or symbols.
Auditory Learners	Lectures Discussions Recordings/Audio books Verbal repetition	Quiet space Background music Talk through tasks	Include discussions Group sessions Mnemonic devices Verbal cues	Mnemonic devices Rhymes Songs Record and listen
Kinesthetic Learners	Hands-on activities Practical applications Manipulatives Movement	Space allows movement Hands-on tools Standing/walking while working	Short sessions Focused intervals Physical activities Stress balls Notetaking/doodling	Practice hands-on Manipulatives to reinforce

Section 2.5

2.5 Local Labor Market Information: Are there aspects of the labor market to consider with the themes chosen? Information can be gathered in different ways, including neighborhood mapping, https://www.bls.gov/, or http://www.stats.Indiana.edu/.

Are there jobs available in the goal area the participant wants to pursue?

Section 3

3. Optional Signature Page for Final Discovery Profile

I have participated and agree to the information and recommendations in this profile.

_____

Signature of Participant   Date (month, day, year)

_____

Signature of Participant's Parent or Guardian, as applicable   Date (month, day, year)

_____

Signature of Community Rehabilitation Provider Representative   Date (month, day, year)

_____

Signature Other   Date (month, day, year)

Discovery Touch Points

Discovery Meetings

- First Discovery meeting once participant has been assigned
- Participant misses two consecutive discovery meetings or when engagement becomes a concern
- If there are five or less hours remaining on the current discovery authorization
- When a vocational goal is identified, and the participant is ready to move to job development
- If the participant obtains a job during discovery, meet to discuss work experience/discovery vs. job placement
- Approximately six weeks after initial discovery meeting

Best Practices

DO:

- Know how many hours are left on your authorization – this is helpful!

- Pick up the phone and call the VRC for any questions or to provide feedback

- Provide detailed information. Think about what the team needs to know.

- Make sure your documentation is submitted timely

- Submit to the VR general office email address

DON'T:

- Don't skip relevant sections.

- Don't be afraid to enter tentative information. This is a working document and should be updated as progress is made.

Documentation Expectations

Clear: Use simple & direct language to describe the **PARTICIPANT'S** activities.

Connected: Activities align with VRC's guidance on the referral form.

Complete: All questions included in the discovery referral are answered. All areas if the forms are completed. No blanks!

Comprehensive: Activity descriptions provide all relevant details that describe and evaluate the client's strengths, interests, skills, and accommodation needs related to a vocational theme.

Use referral as your map
You need to D.I.G.

Data: **What did you see and hear?**
- State the facts
- Provide details: Who, What, When, Where, Why & How
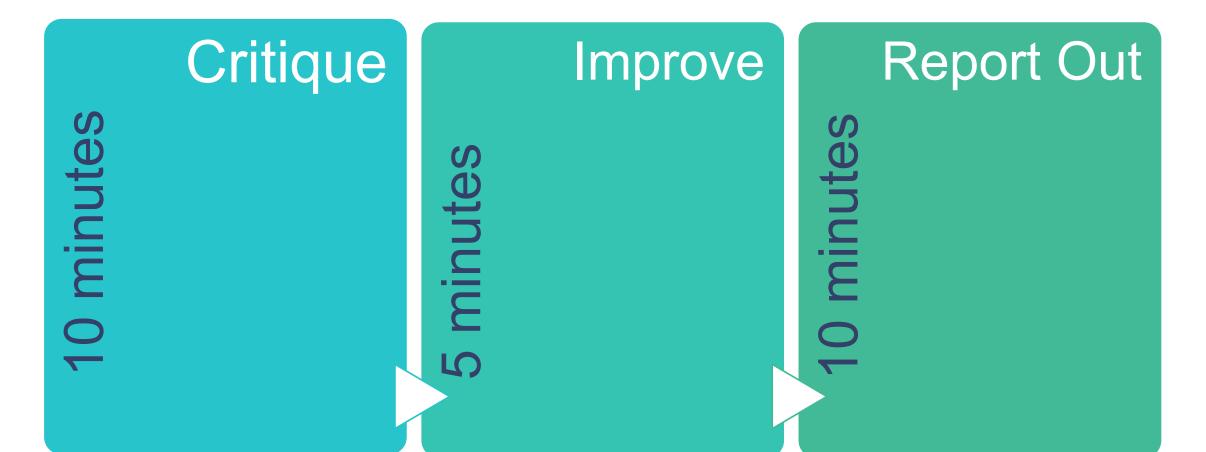
Interpretation: *What is your assessment of what happened? What was learned?*
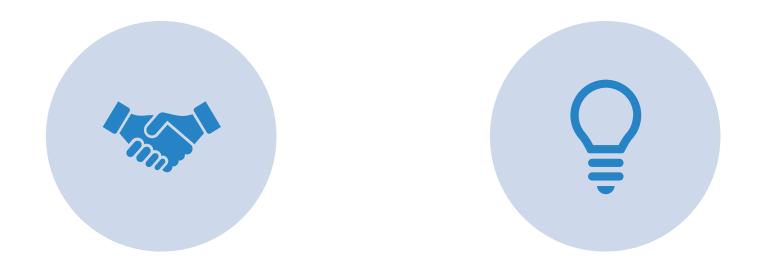- State your findings & provide information to support your conclusions.

Goals: **What was the purpose for Discovery activities?**
What questions were we trying to answer?
Were the answers found? If not, what should be done next?

D.I.G.

Data. Interpretation. Goals.

Guided Small Group Exercise

Critique

10 minutes

Improve

5 minutes

Report Out

10 minutes

Conclusion

Have questions?   Need Resources?

Resources

Scheduling Discovery Meetings

Discovery Myths (in.gov)

FSSA: DDRS: Vocational Rehabilitation Employment Services (in.gov)

INDATA: Loans technology, podcasts, and expert knowledge

Job Accommodation Network (JAN)

Evaluation Survey

Your feedback is needed!